<table>
<thead>
<tr>
<th>Ability: Prospect</th>
<th>Session</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gain sufficient access to decision makers</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>to meet income goal</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

**Diagnostic: Key Behaviors**

<table>
<thead>
<tr>
<th>Diagnostic: Key Behaviors</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. When possible, do necessary research to be prepared for call using Industry Insights</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Utilize four corners marketing and/or geographic prospecting</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Leverage coordinators and/or veteran associates where appropriate</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Review pipeline via appropriate frequency and medium of communication</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Ability: Present to Decision Maker</th>
<th>Session</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment scheduled</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>3</td>
<td></td>
</tr>
</tbody>
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<th>3</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Ensure all decision makers are present</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Leverage coordinators and/or veteran associates where appropriate</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Have a firm, next step</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>4. Overcome objections</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

0 = Not applicable  
1 = Novice: Not demonstrating or even attempting the skills, knowledge or behaviors. When does attempt, the attempt is shaky.  
2 = Intermediate: Not consistently trying out the behavior and not consistent when attempting the behavior, but showing progress and some level of ability.  
3 = Solid: Consistently attempting the behavior and shows consistent proficiency.  
4 = Expert: Consistent and outstanding performance. Performer is very fluid and natural.
<table>
<thead>
<tr>
<th>Ability: Enroll</th>
<th>Session</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meet participation requirement to meet minimum and stretch goals</td>
<td>1 2 3</td>
<td></td>
</tr>
</tbody>
</table>

**Diagnostic: Key Behaviors**

1. Set appropriate expectations for employers
2. Gain access to all employees
3. Utilize a suitable, private environment

<table>
<thead>
<tr>
<th>Ability: Manage Assets</th>
<th>Session</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meet target percent of open enrollments completed</td>
<td>1 2 3</td>
<td></td>
</tr>
</tbody>
</table>

**Diagnostic: Key Behaviors**

1. Install service binder at employer
2. Proactively contact customer to ensure payment of first invoice
3. Follow elements of 90-day open enrollment plan

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